

# myCalPERS Retirement Enrollment

Student Guide

**June 21, 2025**



# Introduction

This student guide will assist you with adding, modifying, and reconciling retirement appointments. You must report an employee’s retirement enrollment and ongoing appointment information to CalPERS in a timely manner. An appointment is a continuous term of employment with a single employer, from the point of membership eligibility until permanent separation. Changes to an appointment status such as a permanent separation, leave of absence, or member category are reportable events.

## Disclaimer

Business partner and participant information has been masked in this procedure guide.

## System Access

If myCalPERS does not allow you to do these scenarios, contact your agency’s system access administrator to update your myCalPERS access.

## Training Opportunities

Prior to taking a myCalPERS training, new users should review the [Introduction to myCalPERS for Business Partners \(PDF\)](#) student guide and take a [Business Rules class](#). Business rules summarize the laws defined by the California Public Employees’ Retirement Law (PERL).

## Contents

|   |    |
|---|----|
| Unit 1: Person Search Tool.....                     | 3  |
| Unit 2: New Appointments .....                      | 10 |
| Unit 3: Maintain Enrollment .....                   | 18 |
| Unit 4: Retirement Appointment Reconciliation ..... | 27 |
| CalPERS Resources .....                             | 30 |
| CalPERS Contacts .....                              | 32 |

## Unit 1: Person Search Tool

The Person Search tool allows you to verify membership status and confirm appointment information.

### Contents

|   |   |
|---|---|
| Scenario 1: Verify CalPERS Membership .....   | 4 |
| Scenario 2: Verify a School Employee's Eligibility for Retirement System Election ..... | 5 |
| Scenario 3: Review Retirement Appointment Details .....                                 | 6 |

## Scenario 1: Verify CalPERS Membership

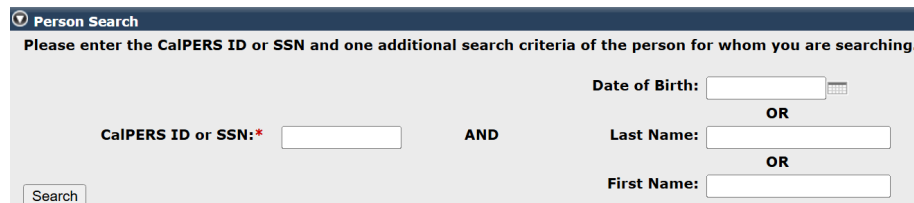
You hired a new employee whose appointment does not qualify for membership, so you will check their membership status. If they are already a member (have member contributions on file), they must be enrolled into retirement within 90 days; otherwise, your agency will pay all arrears contributions (both member and employer) and an administrative fee of \$500.

### Step Actions (7 Steps)

Step 1 Select the **Person Information** global navigation tab.

---

Step 2 Complete the Person Search section.



**Person Search**  
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

|                     |                      |     |                |                      |
|---------------------|----------------------|-----|----------------|----------------------|
| CalPERS ID or SSN:* | <input type="text"/> | AND | Date of Birth: | <input type="text"/> |
|                     |                      |     | OR             |                      |
|                     |                      |     | Last Name:     | <input type="text"/> |
|                     |                      |     | OR             |                      |
|                     |                      |     | First Name:    | <input type="text"/> |

Step 3 Select the **Search** button.

---

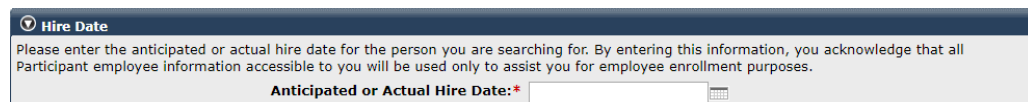
Step 4 Did the Search Results section display “No results found.”?

**Yes:** They are not a member. Save a screenshot that includes the date in the upper right corner. This serves as proof that as of today, the employee was not a member. **You have completed this scenario.**

**No:** Continue to step 5.

---

Step 5 In the Hire Date section, enter the appropriate date into the Anticipated or Actual Hire Date field.



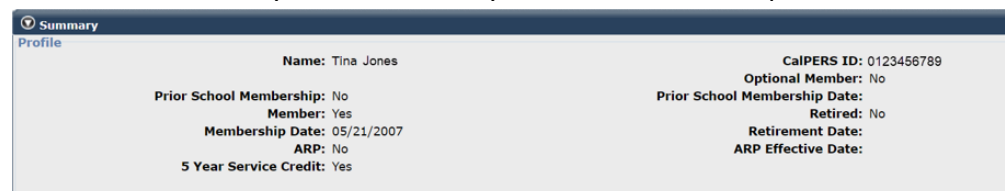
**Hire Date**  
Please enter the anticipated or actual hire date for the person you are searching for. By entering this information, you acknowledge that all Participant employee information accessible to you will be used only to assist you for employee enrollment purposes.

Anticipated or Actual Hire Date:\*

Step 6 Select the **Continue** button.

---

Step 7 Review the Summary section to verify CalPERS membership.



**Summary**  
Profile

|                             |                               |
|-----------------------------|-------------------------------|
| Name: Tina Jones            | CalPERS ID: 0123456789        |
| Prior School Membership: No | Optional Member: No           |
| Member: Yes                 | Prior School Membership Date: |
| Membership Date: 05/21/2007 | Retired: No                   |
| ARP: No                     | Retirement Date:              |
| 5 Year Service Credit: Yes  | ARP Effective Date:           |

Member: Yes means they have member contributions but may or may not be actively working. No means they are a non-member (no member contributions on file), e.g., a prior member who refunded, a dependent on health benefits, a beneficiary, etc.

**You have completed this scenario.**

---

## Scenario 2: Verify a School Employee's Eligibility for Retirement System Election

This scenario is only for school employers.

You have a new employee who is entering a certificated position or position performing creditable service. Using the steps in scenario 1, verify their CalPERS membership eligibility for the Retirement System Election (ES372) process.

| Summary   |                               |
|---|-------------------------------|
| Profile   |                               |
| Name: Paula Pers  | CalPERS ID: 0123456789        |
| Prior School Membership: No                                 | Optional Member: No           |
| Member: Yes   | Prior School Membership Date: |
| Membership Date: 01/28/2019                                 | Retired: No                   |
| ARP: No   | Retirement Date:              |
| 5 Year Service Credit: Yes                                  | ARP Effective Date:           |
| Eligibility for Retirement System Election as of Today: Yes |                               |

The Eligibility for Retirement System Election as of Today field:

**Yes:** The employee has:

- Five years of service credit in CalPERS or
- Previous CalPERS-covered employment within 120 days of the new position hire date with a school employer, Board of Governors of the Community Colleges, or State Department of Education.

**No:** The employee has:

- Less than five years of CalPERS service credit and
- Not previously worked in a CalPERS-covered position with a school employer, the Board of Governors of the Community Colleges, or the State Department of Education within 120 days.

The indicator:

- Does not provide direction on the CalSTRS criteria if the position mandatorily qualifies for CalPERS membership upon hire. Ensure the position meets the criteria.
- Only provides eligibility as of the current date. Verify the eligibility indicator on the date of hire to determine ES372 eligibility.
- Does not take into consideration if a member refunded or retired from CalPERS. It may reflect Yes even if they are ineligible due to being refunded or retired. Verify the employee's status before making a final determination.

**You have completed this scenario.**

---

### Scenario 3: Review Retirement Appointment Details

You may access employee appointment information specific to your agency. Verify your employee's retirement appointment details, as this ensures the accuracy of their appointment (start date, enrollment level, etc.) and historical information (service credit, member funds on deposit, and membership date). Review the following:

- Appointment Event History
- Appointment Details
- Membership Information
- Reciprocal Self-Certification Information
- Retired Annuitant Information
- Retired Annuitant Special Criteria

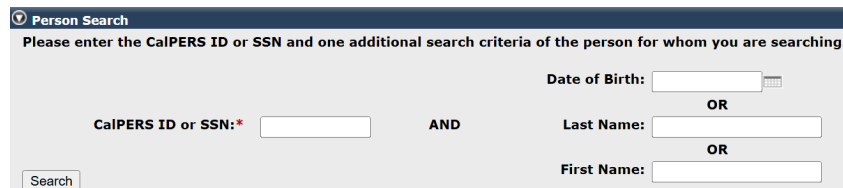
### System Logic

For an appointment with a future effective date, not all the employee's profile page will display until their enrollment date; however, you can review their appointment details.

### Step Actions (5 Steps)

Step 1 Select the **Person Information** global navigation tab.

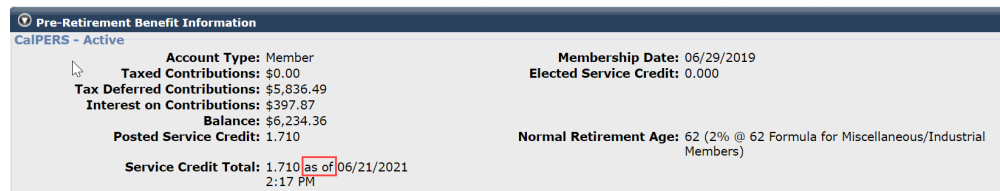
Step 2 Complete the Person Search section.



The form is titled "Person Search" and includes a sub-header: "Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching." It features three input fields: "CalPERS ID or SSN:\*" (with a red asterisk), "Date of Birth:" (with a calendar icon), and "Last Name:" (with an "OR" label above it). There is also a "First Name:" field (with an "OR" label above it). A "Search" button is located at the bottom left.

Step 3 Select the **Search** button.

Step 4 Within the Pre-Retirement Benefit Information section, verify the service credit and member contributions.

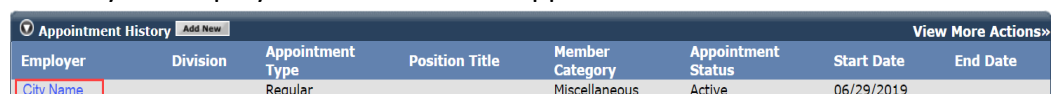


The section is titled "Pre-Retirement Benefit Information" and includes a sub-header: "CalPERS - Active". It displays the following information:

| Account Type: Member                                 | Membership Date: 06/29/2019  |
|--|--|
| Taxed Contributions: \$0.00                          | Elected Service Credit: 0.000  |
| Tax Deferred Contributions: \$5,836.49               |  |
| Interest on Contributions: \$397.87                  |  |
| Balance: \$6,234.36                                  |  |
| Posted Service Credit: 1.710                         | Normal Retirement Age: 62 (2% @ 62 Formula for Miscellaneous/Industrial Members) |
| Service Credit Total: 1.710 as of 06/21/2021 2:17 PM |  |

The service credit total will reflect the current date and time even though the totals are when payroll was last posted.

Step 5 Within the Appointment History section, select the appropriate **Employer** link to review your employee's current active appointment and event details.



| Appointment History <span>Add New</span> |          |                  |                |                 |                    |            | View More Actions» |
|--|----------|------------------|----------------|-----------------|--------------------|------------|--------------------|
| Employer                                 | Division | Appointment Type | Position Title | Member Category | Appointment Status | Start Date | End Date           |
| <a href="#">City Name</a>                |          | Regular          |                | Miscellaneous   | Active             | 06/29/2019 |                    |

## Appointment Event History

The employee's appointment events begin with a new appointment and end with a permanent separation. In between may be an appointment change, site change (a state employee transfer between state agencies), or a begin and/or end leave of absence. When there is a long list of events, you may need to select the View All Site Events check box to display older events.

Select a **View Event Details** link to review the event history (when the event was created or updated and who made the change).

| Appointment Event History <a href="#">Add New</a> |  |   |
|---|--|---|
| <a href="#">Correct Event</a>                     | <a href="#">Delete</a>                           | <input type="checkbox"/> View All Site Events <a href="#">Display</a> |
| <a href="#">Extended Appointment History</a>      | <a href="#">Appointment Detail Change Report</a> | <a href="#">Appointment Event Details</a>                             |
| Event Date  | Event  | Event Details   |
| <input type="radio"/> 05/12/2019                  | Appointment Change                               | <a href="#">View Event Details</a>                                    |
| <input type="radio"/> 07/10/2014                  | End Leave  | <a href="#">View Event Details</a>                                    |
| <input type="radio"/> 02/16/2014                  | Begin Leave                                      | Family Medical Leave  |
| <input type="radio"/> 12/05/2011                  | New Appointment                                  | <a href="#">View Event Details</a>                                    |
| <a href="#">Correct Event</a>                     | <a href="#">Delete</a>                           | <input type="checkbox"/> View All Site Events <a href="#">Display</a> |

## Appointment Details

|                                       |   |
|---------------------------------------|---|
| <b>Appointment Details</b>            |   |
| <b>Programs</b>                       |   |
| Program: CalPERS                      | <b>Membership Date:</b> 12/05/2011  |
| Membership Status: Active             | <b>Enrollment Eligibility Date:</b> 12/05/2011  |
| <b>Position Information</b>           |   |
| Employer: City Name                   | CalPERS ID (Employer): 0987654321   |
| Original Hire Date: 12/05/2011        | Work Calendar: Work 12 Months/Paid 12 Months  |
| <b>Member Category:</b> Safety - Fire | Temporary Position: No  |
| Transit Worker: No                    | Is member subject to local Alternate No   |
| Position Title: CBU: -                | Retirement Plan (Gov Code Section 20306)?   |
| Retired Annuitant: No                 | Appointment ID: 91619490  |
| Enrollment Reason:                    | Contributing Appointment Date: 12/05/2011   |
| Contributing Appointment: Yes         | Leave Type:   |
| Appointment Status: Active            | <b>Formula Name:</b> 3% @ 55 Formula for State Peace Officer/Firefighter or Local Safety Member |
| Years Prior Service:                  | Cost Share: 4.0   |
| <b>Enrollment Level:</b> Classic      |   |
| <b>Member Base Rate:</b> 9.0          |   |
| Contribution Modification:            |   |

The member category, enrollment level, and membership date determine the member's base rate and formula.

- **Membership Date:** The date the member became eligible for CalPERS membership.
- **Member Category:** Based on their position at your agency, this is entered when processing a new retirement enrollment or if it's changed.
- **Enrollment Level:** Classic and PEPR New are based on the membership date and if they have reciprocal membership in the Reciprocal Self-Certification Form Information section.
- **Member Base Rate:** Member's enrollment level and formula determine their base rate (contribution rate/percentage of their reportable earnings that is paid to CalPERS).
- **Formula Name:** This includes the member's category, benefit level, and normal retirement age. This formula is used when CalPERS calculates the member's retirement.

## Membership Information

This is based on your agency's contract and the member's appointment details. This includes CalPERS and CalSTRS election, Social Security, '59 survivor benefits, optional member election, and certificated employee (school employers).

## Reciprocal Self-Certification Form Information

Completion of the Reciprocal Self-Certification Form does not establish reciprocity; it is used for enrollment purposes only. To establish reciprocity, the employee must submit the Confirmation of Intent to Establish Reciprocity When Changing Retirement Systems (CalPERS 1006) form (from the [When You Change Retirement Systems \(PUB 16\) \(PDF\)](#) publication) to CalPERS or make the request in their member myCalPERS account.

| Reciprocal Self-Certification Form Information  |            |
|---|------------|
| You are required to provide and process the Reciprocal Self-Certification form for every new enrollment in CalPERS. The data provided in this section must be entered based on the self-certified data by the member. You must keep a copy of the form in your records for auditing purposes. For direction on how to process the form, visit our employer reference guide. The information entered is used to determine retirement enrollment level only, it will not establish reciprocity for the participant. |            |
| <b>Reciprocal Member Indicator:</b> Yes   |            |
| <b>Most Recent Reciprocal Agency:</b> San Bernardino County Employees' Retirement Association (SBCERA)  |            |
| <b>Earliest Qualifying Reciprocal Membership Date:</b>  | 08/01/2016 |
| <b>Most Recent Reciprocal Permanent Separation Date:</b> 12/03/2022   |            |
| <b>Retired Reciprocal Member Indicator:</b> No  |            |
| <b>Reciprocal Retirement Date :</b> N/A   |            |
| <b>Refunded Reciprocal Member Indicator:</b> No   |            |
| <b>Reciprocal Refunded Date:</b> N/A  |            |

Use the Reciprocal Self-Certification Form (myCalPERS 1187) the member completed to complete the Reciprocal Self-Certification Form Information section.

- **Reciprocal Member Indicator:** Indicates if the employee is a member of a reciprocal retirement system.
- **Most Recent Reciprocal System:** The name of the system the member was with prior to becoming a CalPERS member.
- **Earliest Qualifying Reciprocal Membership Date:** The membership date with the reciprocal system.
- **Most Recent Reciprocal Permanent Separation Date:** The separation date from the reciprocal system.
- **Retired Reciprocal Member Indicator:** If yes, you will be prompted to enter the date the member retired with their reciprocal system.
- **Refunded Reciprocal Member Indicator:** If yes, you will be prompted to enter the date the member refunded from their reciprocal system.

Your agency is responsible for ensuring all information is entered accurately based on the information provided on the Reciprocal Self-Certification Form. We encourage you to request the member provide substantiating documentation with the form if they are placed into the classic enrollment level due to the information provided. If this information is later found to be inaccurate, we will request your agency to make changes to the enrollment. Any resulting adjustments will be your agency's responsibility.



## Retired Annuitant Information

This includes the retired annuitant (RA) type, 180-day exception, and 180-day exception reason.

|  |
|--|
| <b>Retired Annuitant Information</b>                         |
| <b>Retired Annuitant Type:</b> Extra Help                    |
| <b>180-Day Exception?</b> Yes                                |
| <b>180-Day Exception Reason:</b> Appointed by governing body |

## Retired Annuitant Special Criteria

Displays if the RA was hired with an earnings limit or due to an executive order.

|  |
|--|
| <b>Retired Annuitant Special Criteria</b>                                  |
| <b>Earnings Limit?</b> No  |
| <b>Executive Order?</b> Yes  |
| <b>Executive Order Number:</b> B-53-18 Shasta Lake, Mendocino and Siskiyou |
| <b>Executive Begin Date:</b> 12/30/2020                                    |
| <b>Executive End Date:</b> 02/05/2021                                      |

**You have completed this scenario.**

---

## Unit 2: New Appointments

This unit provides the steps on how to add a new appointment for eligible employees and retired annuitants.

### Contents

|  |    |
|--|----|
| Scenario 1: Add a New Retirement Enrollment.....     | 11 |
| Scenario 2: Add a Retired Annuitant Appointment..... | 14 |

## Scenario 1: Add a New Retirement Enrollment


It is your responsibility to enroll qualifying CalPERS members within 90 days. If the member is not enrolled timely, CalPERS will assess administrative costs and arrears contributions (member and employer). Enroll your employee into CalPERS membership by completing the following:

- Verify if the employee has an existing myCalPERS account
- Confirm demographics
- Report appointment details
- Indicate reciprocal self-certification if it is applicable

### Step Actions (23 Steps)

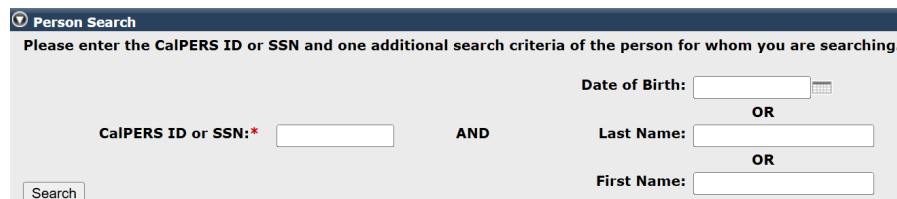
Step 1 Select the **Reporting** global navigation tab.

Step 2 Within the Create or Edit Report section, select Add Retirement Enrollment from the Method drop-down list.



Step 3 Select the **Continue** button.

Step 4 Complete the Person Search section.

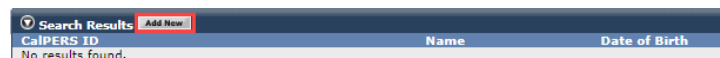


Step 5 Select the **Search** button.

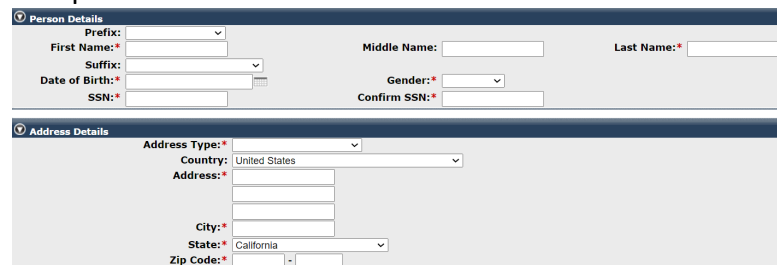
Step 6 What displayed next?

- **Search Results section shows “No results found”:** Continue to step 7.
- **Appointment Details page:** Skip to step 14.

Step 7 Within the Search Results section, select the **Add New** button.



Step 8 Complete the Person Details and Address Details sections.



Step 9 Complete the Address and Communication Details sections.

The screenshot shows two sections of a form. The first section, titled "Address Details", contains fields for "Address Type" (a dropdown menu), "Country" (a dropdown menu set to "United States"), "Address" (a multi-line text input), "City" (a text input), "State" (a dropdown menu set to "California"), and "Zip Code" (a text input with a hyphen). The second section, titled "Communication Details", contains a table with columns: "Primary", "Phone Type", "Phone Number", "Extension", and "International". The "Phone Type" column lists "Work", "Fax", "TTY", "Cellular", "Home", and "Other". The "Primary" column has radio buttons. The "International" column has checkboxes. Below the table, there is a "Primary" radio button and an "Email" text input field.

Step 10 Select the **Primary** radio button for one phone number and an email address.

Step 11 Select the **Save & Continue** button.

Step 12 If multiple addresses display, select the radio button for the correct address.

Step 13 Select the **Confirm** button.

Step 14 Select the **Save & Continue** button.

Step 15 Complete the Appointment Details section.

The screenshot shows the "Appointment Details" section of a form. It includes a "Program" dropdown menu set to "CalPERS", an "Enrollment Eligibility Date" field, and a "Position Information" section. The "Position Information" section contains fields for "Employer" (City Name), "Division" (dropdown), "Original Hire Date" (calendar icon), "Member Category" (dropdown), "Position Title" (dropdown), "Work Calendar" (dropdown), "Retired Annuitant" (radio buttons), "CBU" (dropdown), "Enrollment Reason" (dropdown), and "Refunded Appointment" (radio buttons). There are also "CalPERS ID (Employer): 0987654321" and "CalPERS ID (Division): 0" displayed.

Step 16 Complete the questions which are based on your agency type (non-central state, school, or public agency) and the member category.

The screenshot shows the "Membership Information" section of a form. It includes a "Member Information" section with two questions: "Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?" and "Is the member subject to Social Security?". Both questions have "Yes" and "No" radio button options. Below these is an "Optional Member Election" section with an "Optional Member?" question, also with "Yes" and "No" radio button options.

- Step 17 Continue completing questions in the Membership Information section.  
If the member is not subject to Social Security, upload the SSA-1945 form.

The screenshot shows the 'Membership Information' section of a web form. It contains two questions with radio button options: 'Is the member subject to local Alternate Retirement Plan (Gov Code Section 20306)?' and 'Is the member subject to Social Security?'. Both have 'No' selected. Below the Social Security question is a dropdown for 'SSA Exclusion Reason:' set to 'Other' and a text field for 'SSA Other Reason:'. A link for 'SSA-1945 Form: Provide Document' is present. A detailed note at the bottom explains the requirement for the SSA-1945 form under Public Law 108-203.

- Step 18 On the Reciprocal Self-Certification Form (myCalPERS 1187) section 1, did the member indicate that they have membership in a defined benefit plan?  
**Yes:** In the Reciprocal Self-Certification Form Information section, select the **Yes** radio button.  
**No:** Skip to step 21.

- Step 19 Complete the Reciprocal Self-Certification form Information section using the information the Reciprocal Self-Certification Form (myCalPERS 1187).

The screenshot shows the 'Reciprocity' section of a web form. It includes a disclaimer about the form's purpose. Below are several fields: 'Reciprocal Member Indicator:' with 'Yes' selected, 'Most Recent Reciprocal Agency:' as a dropdown, 'Earliest Qualifying Reciprocal Membership Date:' and 'Most Recent Reciprocal Permanent Separation Date:' as date pickers, 'Retired Reciprocal Member Indicator:' with 'No' selected, and 'Refunded Reciprocal Member Indicator:' with 'No' selected.

- Step 20 Skip to step 22

- Step 21 In the Reciprocal Self-Certification Form Information, select the **No** radio button.

This screenshot is similar to the previous one but shows the 'Reciprocal Member Indicator:' with the 'No' radio button selected. A red box highlights this selection.

- Step 22 Select the **Save** button.

- Step 23 Did the following message display?

The appointment you have entered is more than 90 days in the past of membership eligibility. Please review and confirm the date entered is correct and save your changes.

**Yes:** Select the **Save** button. **You have completed this scenario.**

**No:** **You have completed this scenario.**

## Scenario 2: Add a Retired Annuitant Appointment

Retired annuitant (RA) is the term for a CalPERS retiree employed by a CalPERS-contracted agency. An RA's appointment must be entered within 30 days of their hire date; otherwise, a \$200 fee will be assessed for each month the appointment is late. When a new RA appointment is entered in myCalPERS, employers and RAs will receive information regarding the rules and regulations about post-retirement CalPERS employment. Add a retired annuitant appointment by doing the following:

- Verify the retiree worked for your agency or another CalPERS agency
- Verify they retired more than 180 days
- Confirm demographics
- Report appointment details
- Identify the retired annuitant type
- Determine if exempt from the 180-day wait period
- Determine the retiree's normal retirement age (bona fide separation requirement)

**Note:** If a retired annuitant is reinstating from retirement, then you will need to process a new membership appointment.

### Step Actions (23 Steps)

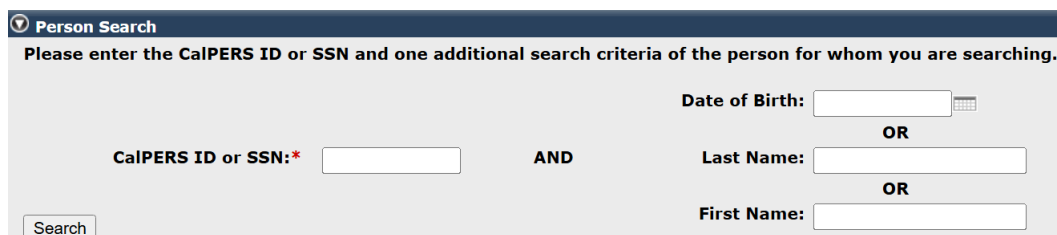
Step 1 Did the retired annuitant previously work for your agency?

**Yes:** Select the **Person Information** global navigation tab.

**No:** Skip to step 6.

---

Step 2 Complete the Person Search section.



---

Step 3 Select the **Search** button.

---

Step 4 Within the Appointment History section, select the **Add New** button.



| Appointment History <span>Add New</span> <span>View More Actions»</span> |          |                  |                |                 |                    |            |            |
|--|----------|------------------|----------------|-----------------|--------------------|------------|------------|
| Employer   | Division | Appointment Type | Position Title | Member Category | Appointment Status | Start Date | End Date   |
| City Name  |          | Regular          |                | Miscellaneous   | Active             | 06/29/2019 | 11/28/2020 |

---

Step 5 Skip to step 11.

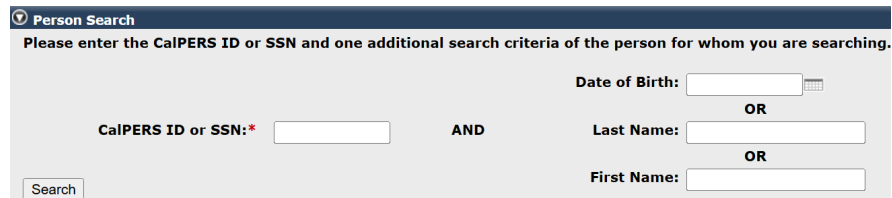
---

Step 6 Select the **Reporting** global navigation tab.

Step 7 Within the Create or Edit Report section, select Add Retirement Enrollment from the Method drop-down list.

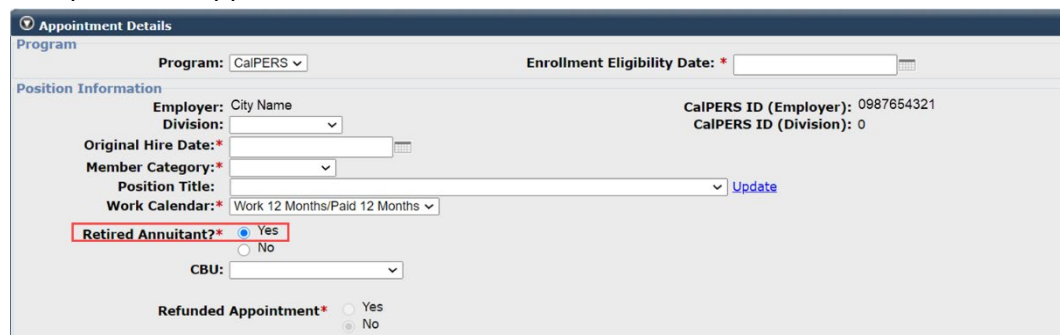
Step 8 Select the **Continue** button.

Step 9 Complete the Person Search section.

The form is titled "Person Search" with a sub-header "Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching." It features a "Search" button on the left. The main search area is divided into two columns by the word "AND". The left column has a field for "CalPERS ID or SSN:" with an asterisk and a text input box. The right column has three fields: "Date of Birth:" with a date picker, "Last Name:" with a text input box, and "First Name:" with a text input box. There are "OR" labels between the "Date of Birth" and "Last Name" fields, and between the "Last Name" and "First Name" fields.

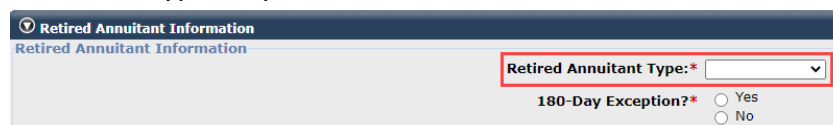
Step 10 Select the **Search** button.

Step 11 Complete the Appointment Details section.

The form is titled "Appointment Details" and is divided into two main sections: "Program" and "Position Information". The "Program" section has a dropdown menu for "Program:" set to "CalPERS" and a date field for "Enrollment Eligibility Date:". The "Position Information" section contains several fields: "Employer:" with a "City Name" dropdown, "Division:" with a dropdown, "Original Hire Date:" with a date picker, "Member Category:" with a dropdown, "Position Title:" with a dropdown, and "Work Calendar:" with a dropdown set to "Work 12 Months/Paid 12 Months". There is an "Update" link next to the "Position Title" dropdown. Below these fields are three radio button options: "Retired Annuitant?\*" with "Yes" selected, "CUBU:" with a dropdown, and "Refunded Appointment\*" with "Yes" and "No" options. On the right side of the "Position Information" section, there are two lines of text: "CalPERS ID (Employer): 0987654321" and "CalPERS ID (Division): 0".

If the RA retired from your agency, myCalPERS will require the original hire date at your agency. Refer to unit 1, Review Retirement Appointment Details for where to locate this information. Skip to step 13.

Step 12 Within the Retired Annuitant Information section, select from the Retired Annuitant Type drop-down list.

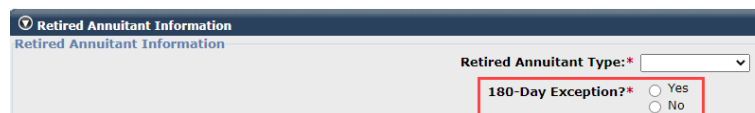
The form is titled "Retired Annuitant Information" and has a sub-header "Retired Annuitant Information". It features a dropdown menu for "Retired Annuitant Type:" with a red box around it. Below this dropdown are two radio button options: "180-Day Exception?\*" with "Yes" and "No" options.

Step 13 Does this appointment have a 180-day exception?

**Yes:** Select the **Yes** radio button and continue to step 16.

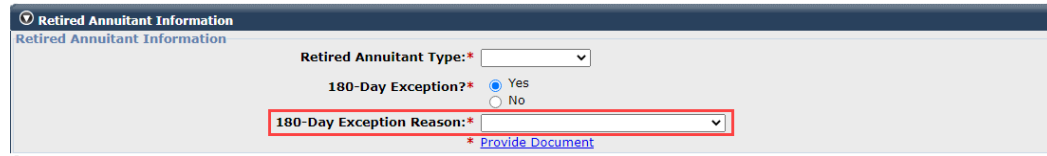
**No:** Select the **No** radio button, and then skip to step 21.

**Note:** If they are returning due an Executive Order, select **No**.

This is a screenshot of the "Retired Annuitant Information" form, showing the "Retired Annuitant Type:" dropdown and the "180-Day Exception?\*" radio button options. The "180-Day Exception?\*" radio button options are highlighted with a red box.

RAs working under an executive order must be entered but will be exempt from work-hour limitations and the 180-day break in service requirements.

- Step 14 Within the Retired Annuitant Information section, select from the 180-Day Exception Reason drop-down list.



Retired Annuitant Information

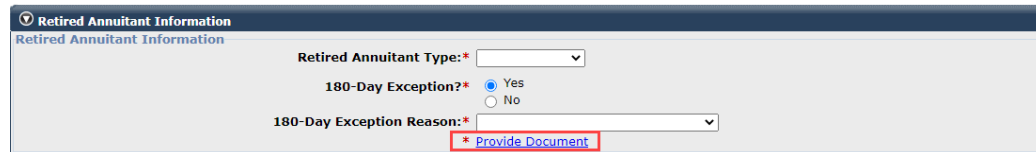
Retired Annuitant Type: \*

180-Day Exception? \* ☒ Yes ☐ No

180-Day Exception Reason: \* ▼

\* [Provide Document](#)

- Step 15 Within the Retired Annuitant Information section, select the **Provide Document** link unless it is for the Returning Safety Position reason.



Retired Annuitant Information

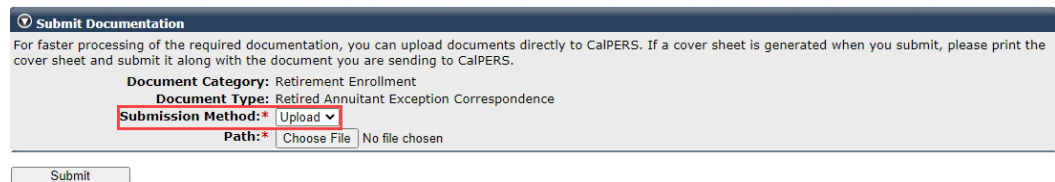
Retired Annuitant Type: \*

180-Day Exception? \* ☒ Yes ☐ No

180-Day Exception Reason: \* ▼

\* [Provide Document](#)

- Step 16 Within the Submit Documentation section, select from the Submission Method drop-down list.



Submit Documentation

For faster processing of the required documentation, you can upload documents directly to CalPERS. If a cover sheet is generated when you submit, please print the cover sheet and submit it along with the document you are sending to CalPERS.

Document Category: Retirement Enrollment

Document Type: Retired Annuitant Exception Correspondence

Submission Method: \* Upload ▼

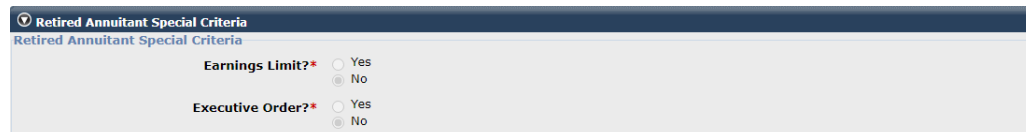
Path: \* Choose File No file chosen

- Step 17 What submission method did you select?
- Mail:** Mail the documentation to CalPERS, and then skip to step 21.
- FAX:** Fax the documentation to CalPERS, and then skip to step 21.
- Upload** (preferred): Select the **Choose file** button, and then continue to step 20.

- Step 18 Upload the file.

- Step 19 Select the **Submit** button.

- Step 20 Skip the Retired Annuitant Special Criteria section.

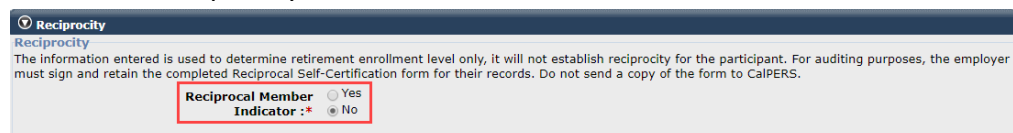


Retired Annuitant Special Criteria

Earnings Limit? \* ☐ Yes ☒ No

Executive Order? \* ☐ Yes ☒ No

- Step 21 Within the Reciprocity section, select the **No** radio button.



Reciprocity

The information entered is used to determine retirement enrollment level only, it will not establish reciprocity for the participant. For auditing purposes, the employer must sign and retain the completed Reciprocal Self-Certification form for their records. Do not send a copy of the form to CalPERS.

Reciprocal Member Indicator: \* ☐ Yes ☒ No

- Step 22 Select the **Save** button.



Step 23

Verify the Appointment Details section is correct.

| Appointment Details   |  |
|---|--|
| <b>Programs</b>   |  |
| Program: CalPERS  | Membership Date: 12/02/1996  |
| Membership Status: Retired  | Enrollment Eligibility Date: 01/15/2021  |
| <b>Position Information</b>   |  |
| Employer: City Name   | CalPERS ID (Employer): 0987654321  |
| Original Hire Date: 12/02/1996                                      |  |
| Member Category: Miscellaneous                                      | Work Calendar: Work 12 Months/Paid 12 Months                                   |
| Transit Worker: No  |  |
| Position Title:   | Temporary Position: No   |
| CBU: -  | Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)? |
|   | Appointment ID: 67890  |
| Retired Annuitant: Yes  |  |
| Enrollment Reason:  | Leave Type:  |
| Contributing Appointment: No  |  |
| Appointment Status: Active  | Formula Name: 2.5% @ 55 Formula for Local Miscellaneous Members                |
| Years Prior Service:  | Cost Share: 0.0  |
| Enrollment Level: Classic   |  |
| Member Base Rate: 8.0   |  |
| Contribution Modification:  |  |
| Created by User: Employer   |  |
| Created on: 01/15/2021 12:44 PM                                     |  |
| Appointment Profile Last Refreshed: 01/15/2021 12:44 PM             | Refunded Appointment: No   |
| <b>Retired Annuitant Information</b>                                |  |
| Retired Annuitant Type: Extra Help                                  |  |
| 180-Day Exception? Yes  |  |
| 180-Day Exception Reason: Appointed by governing body               |  |
| <b>Retired Annuitant Special Criteria</b>                           |  |
| Earnings Limit? No  |  |
| Executive Order? Yes  |  |
| Executive Order Number: B-53-18 Shasta Lake, Mendocino and Siskiyou |  |
| Executive Begin Date: 12/30/2020                                    |  |
| Executive End Date: 02/05/2021                                      |  |

You have completed this scenario.

## Unit 3: Maintain Enrollment

In this unit, you will learn to update and maintain your employees' accounts, enrollments, and appointments.

### Contents

|   |    |
|---|----|
| Scenario 1: Update Demographic Information.....         | 19 |
| Scenario 2: Update Employee Contact Information .....   | 20 |
| Scenario 3: Correct Retirement Appointment Events ..... | 21 |
| Scenario 4: Delete a Retirement Appointment .....       | 22 |
| Scenario 5: Process a Leave of Absence .....            | 23 |
| Scenario 6: Process an Appointment Change.....          | 24 |
| Scenario 7: Process a Permanent Separation .....        | 25 |
| Scenario 8: Delete an Appointment Event .....           | 26 |

## Scenario 1: Update Demographic Information

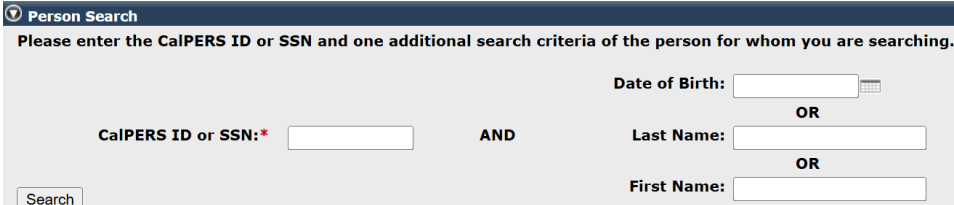
### System Logic

- Before correcting demographic information, your employee must provide a verification document. Refer to the [Public Agency & Schools Reference Guide \(PDF\)](#) for a list of acceptable documentation.
- Name changes/corrections will impact payroll reporting.
- If the member is also enrolled in health benefits with CalPERS, the demographic changes will be reported to their health carrier.
- When demographic information is updated in myCalPERS, a letter is mailed to the member advising them of any changes.


### Step Actions (6 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.



**Person Search**  
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

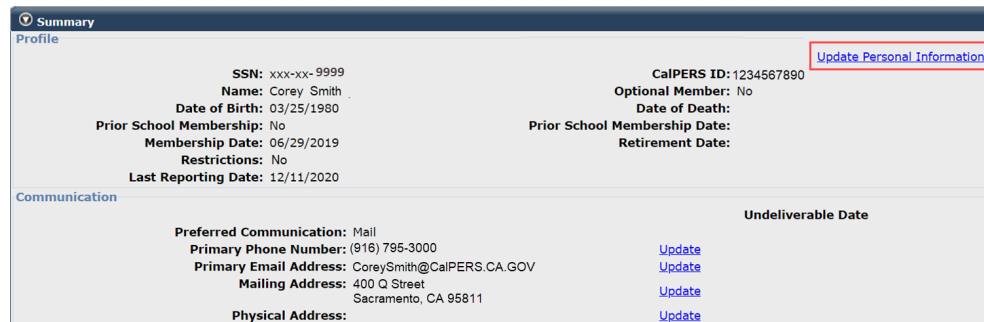
CalPERS ID or SSN: \*  AND Date of Birth:  

OR  
Last Name:

OR  
First Name:

Step 3 Select the **Search** button.

Step 4 Within the Summary section, select the **Update Personal Information** link.



**Summary**  
Profile

SSN: xxx-xx-9999  
Name: Corey Smith  
Date of Birth: 03/25/1980  
Prior School Membership: No  
Membership Date: 06/29/2019  
Restrictions: No  
Last Reporting Date: 12/11/2020

CalPERS ID: 1234567890  
Optional Member: No  
Date of Death:  
Prior School Membership Date:  
Retirement Date:

[Update Personal Information](#)

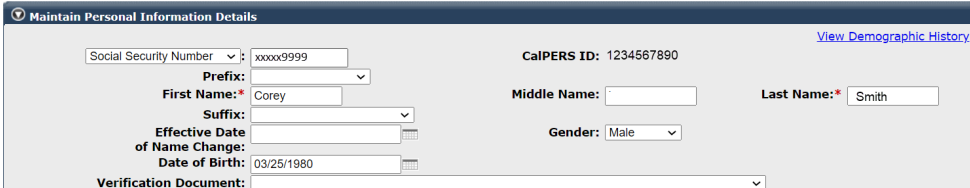
Communication

Preferred Communication: Mail  
Primary Phone Number: (916) 795-3000  
Primary Email Address: CoreySmith@CalPERS.CA.GOV  
Mailing Address: 400 Q Street  
Sacramento, CA 95811  
Physical Address:

Undeliverable Date

[Update](#)  
[Update](#)  
[Update](#)  
[Update](#)


Step 5 Complete the Maintain Personal Information Details section.




**Maintain Personal Information Details** [View Demographic History](#)

Social Security Number:  xxxx9999 CalPERS ID: 1234567890

Prefix:  First Name: \*  Corey Middle Name:  Last Name: \*  Smith

Suffix:  Effective Date of Name Change:   Gender:  Male

Date of Birth: 03/25/1980 

Verification Document:

Step 6 Select the **Save** button.

**You have completed this scenario.**

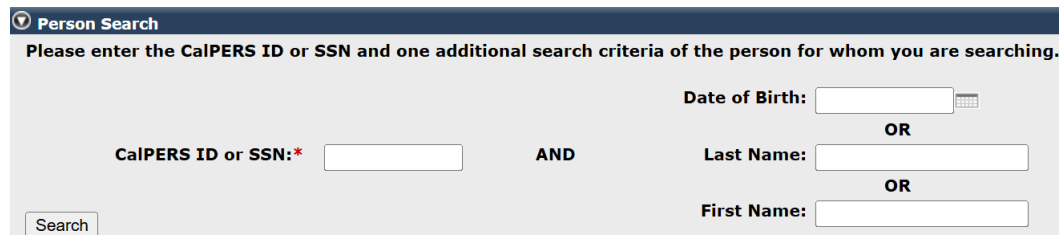
## Scenario 2: Update Employee Contact Information

It's important to update an employee's contact information when needed.

### Step Actions (8 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.



**Person Search**  
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:\*  AND Date of Birth:

Last Name:  OR First Name:

Step 3 Select the **Search** button.

Step 4 Within the Summary section, select the appropriate **Update** link.



**Summary**  
Profile

SSN: xxx-xx-9999  
Name: Corey Smith  
Date of Birth: 03/25/1980  
Prior School Membership: No  
Membership Date: 06/29/2019  
Restrictions: No  
Last Reporting Date: 12/11/2020

CalPERS ID: 1234567890  
Optional Member: No  
Date of Death:  
Prior School Membership Date:  
Retirement Date:

[Update Personal Information](#)

Communication

Preferred Communication: Mail  
Primary Phone Number: (916) 795-3000  
Primary Email Address: CoreySmith@CalPERS.CA.GOV  
Mailing Address: 400 Q Street  
Sacramento, CA 95811  
Physical Address:

Undeliverable Date

[Update](#)  
[Update](#)  
[Update](#)  
[Update](#)

Step 5 Complete the Maintain Communication Details section.

Step 6 Select the **Save** button.

Step 7 Did you update the employee's address?

**Yes:** Confirm the address.

**No:** You have completed this scenario.

Step 8 Select the **Save** button.

**You have completed this scenario.**

## Scenario 3: Correct Retirement Appointment Events

You can correct retirement appointment events (new appointments, permanent separations, leave of absence, and appointment changes).

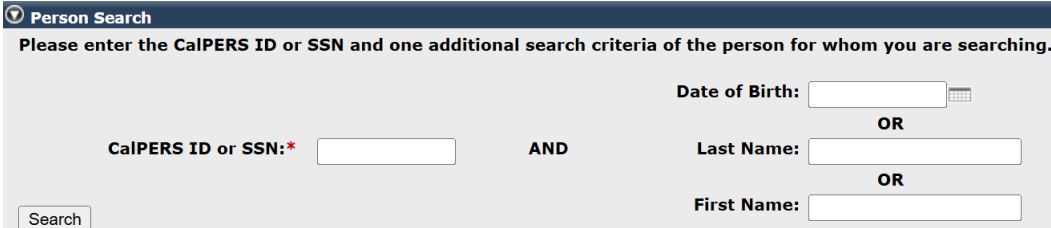
### System Logic

Corrections to appointment information may affect the member's health enrollment and/or payroll.

### Step Actions (8 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.



**Person Search**

Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:\*  AND Date of Birth:

OR

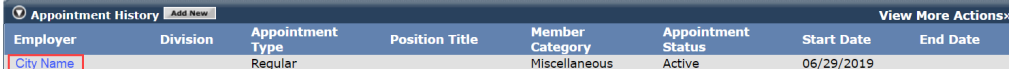
Last Name:

OR

First Name:

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate active **Employer** link.



| Appointment History <input type="button" value="Add New"/> |          |                  |                |                 |                    |            |          | View More Actions» |
|--|----------|------------------|----------------|-----------------|--------------------|------------|----------|--------------------|
| Employer   | Division | Appointment Type | Position Title | Member Category | Appointment Status | Start Date | End Date |                    |
| <a href="#">City Name</a>                                  |          | Regular          |                | Miscellaneous   | Active             | 06/29/2019 |          |                    |

Step 5 Within the Appointment Event History section, select the radio button of the appointment event to correct.



**Appointment Event History**

☐ View All Site Events

| Event Date | Event           | Event Details                      |
|------------|-----------------|------------------------------------|
| 12/03/2016 | New Appointment | <a href="#">View Event Details</a> |

☐   ☐ View All Site Events

Step 6 Select the **Correct Event** button.

Step 7 Correct the information.

Step 8 Select the **Save** button.

**You have completed this scenario.**

## Scenario 4: Delete a Retirement Appointment

On a rare occasion, you may need to delete a retirement appointment. This can only be completed if the appointment does not have health and/or payroll history. If they have either, contact CalPERS for assistance.

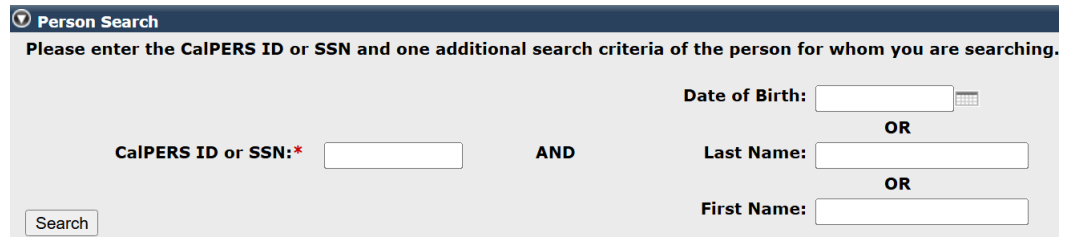
### System Logic

The demographic information and CalPERS ID will remain in myCalPERS; however, there will be no appointment information affiliated to your agency.

### Step Actions (6 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.



**Person Search**

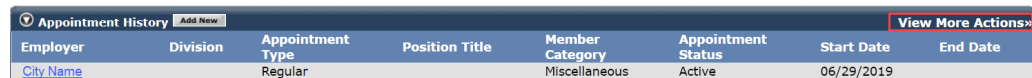
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:\*  AND Date of Birth:

Last Name:  OR First Name:

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **View More Actions** link or **Appointment History** left-side link.



| Appointment History       |          | Add New          |                |                 |                    |            |          | View More Actions |
|---------------------------|----------|------------------|----------------|-----------------|--------------------|------------|----------|-------------------|
| Employer                  | Division | Appointment Type | Position Title | Member Category | Appointment Status | Start Date | End Date |                   |
| <a href="#">City Name</a> |          | Regular          |                | Miscellaneous   | Active             | 06/29/2019 |          |                   |

Step 5 Within the Appointment History section, select the radio button for the appointment.

Appointment History

Add New

Delete

| Employer   | Division | Appointment Type | Position Title | Member Category | Appointment Status | Start Date | End Date |
|--|----------|------------------|----------------|-----------------|--------------------|------------|----------|
| <input checked="" type="radio"/> <a href="#">City Name</a> |          | Regular          |                | Miscellaneous   | Active             | 06/29/2019 |          |

Delete

Step 6 Select the **Delete** button.

**You have completed this scenario.**

## Scenario 5: Process a Leave of Absence

If an employee goes on a leave of absence, such as unpaid leave or FMLA, a Begin Leave event should be entered. It is recommended that you add a future End Leave event when the Begin Leave event is entered. Refer to unit 3, scenario 3 if the End Date event needs to be changed.

### System Logic

myCalPERS will cancel the health enrollment for employees placed on a leave of absence unless it is due to Family Medical Leave Act or Maternity/Paternity leave.

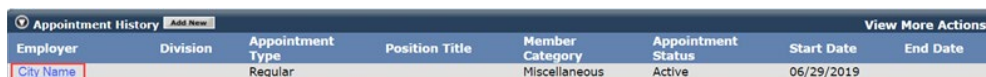
### Step Actions (8 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.

Step 3 Select the **Search** button.

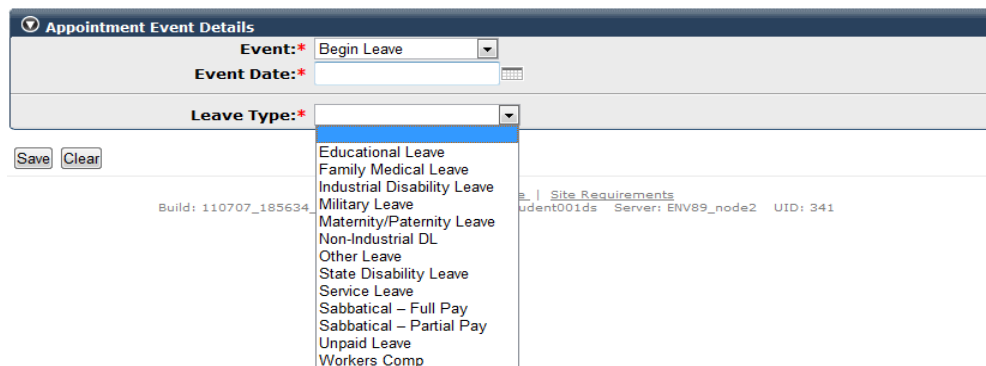
Step 4 Within the Appointment History section, select the appropriate active **Employer** link.



| Employer  | Division | Appointment Type | Position Title | Member Category | Appointment Status | Start Date | End Date |
|-----------|----------|------------------|----------------|-----------------|--------------------|------------|----------|
| City Name |          | Regular          |                | Miscellaneous   | Active             | 06/29/2019 |          |

Step 5 Within the Appointment Event History section, select the **Add New** button.

Step 6 Complete the Appointment Event Details section.



Appointment Event Details

Event: \* Begin Leave

Event Date: \*

Leave Type: \*

Save Clear

- Educational Leave
- Family Medical Leave
- Industrial Disability Leave
- Military Leave
- Maternity/Paternity Leave
- Non-Industrial DL
- Other Leave
- State Disability Leave
- Service Leave
- Sabbatical - Full Pay
- Sabbatical - Partial Pay
- Unpaid Leave
- Workers Comp

The **Begin Leave** event is the day after the last day on payroll, even if it is a weekend or holiday.

Step 7 Select the **Save** button.

Step 8 Do you want to add the End Leave event?

**Yes:** Return to step 5 and enter the **Event Date** field with the date the employee will return to work.

**No:** You have completed this scenario.

## Scenario 6: Process an Appointment Change

Changes can occur throughout an employee's career with your agency. The following appointment changes can be made:

- Member category
- Collective bargaining unit (CBU)
- Position title
- Work calendar

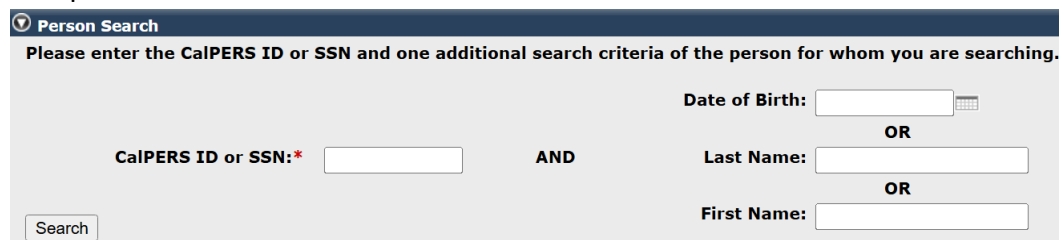
### Best Practices

If you make an appointment change that affects the employee's base rate, notify your agency's payroll department.

### Step Actions (7 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.



**Person Search**

Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:\*  AND Date of Birth:

OR

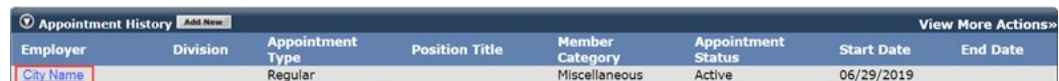
Last Name:

OR

First Name:

Step 3 Select the **Search** button.

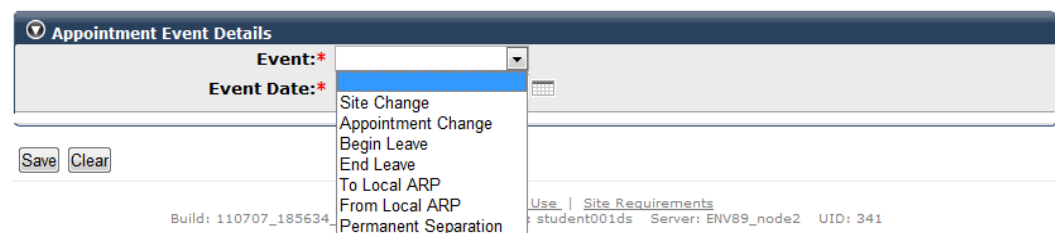
Step 4 In the Appointment History section, select the appropriate active **Employer** link.



| Appointment History |          | Add New          |                |                 |                    |            |          | View More Actions» |  |
|---------------------|----------|------------------|----------------|-----------------|--------------------|------------|----------|--------------------|--|
| Employer            | Division | Appointment Type | Position Title | Member Category | Appointment Status | Start Date | End Date |                    |  |
| City Name           |          | Regular          |                | Miscellaneous   | Active             | 06/29/2019 |          |                    |  |

Step 5 Within the Appointment Event History section, select the **Add New** button.

Step 6 Complete the Appointment Event Details section.



**Appointment Event Details**

Event:\*

Event Date:\*

Site Change  
Appointment Change  
Begin Leave  
End Leave  
To Local ARP  
From Local ARP  
Permanent Separation

Build: 110707\_185634 Use | Site Requirements student001ds Server: ENV89\_node2 UID: 341

Step 7 Select the **Save** button.

**You have completed this scenario.**



## Scenario 7: Process a Permanent Separation

### System Logic

- The permanent separation date is the day after the employee's last day with your agency, which is often the day after the last day on payroll, even if it falls on a weekend or a holiday.
- A refunded appointment will not allow for a Permanent Separation event to be deleted.
- A permanent separation will affect the employee's payroll reporting and health enrollment.
- A permanent separation will deactivate the employee's myCalPERS employer system access. Refer to the [myCalPERS System Access Administration \(PDF\)](#) student guide for information.
- Active employees with no posted payroll within the last six months will automatically be permanently separated through a monthly process.

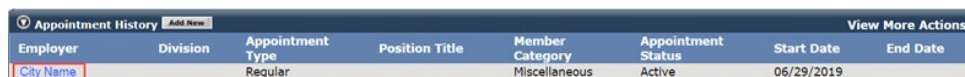
### Step Actions (7 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.

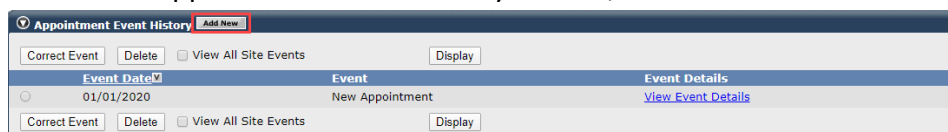
Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate **Employer** link.



| Employer                  | Division | Appointment Type | Position Title | Member Category | Appointment Status | Start Date | End Date |
|---------------------------|----------|------------------|----------------|-----------------|--------------------|------------|----------|
| <a href="#">City Name</a> |          | Regular          |                | Miscellaneous   | Active             | 06/29/2019 |          |

Step 5 Within the Appointment Event History section, select the **Add New** button.



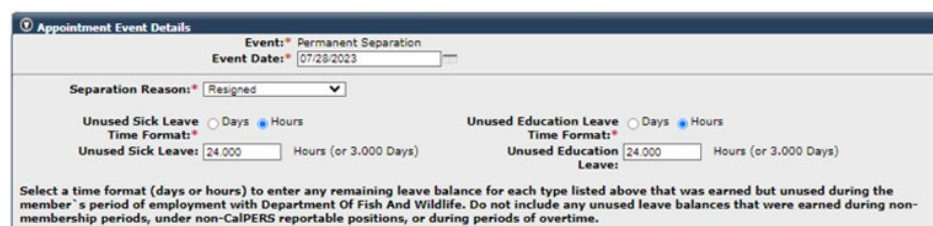
Appointment Event History **Add New**

☐ View All Site Events

☐ 01/01/2020 ☐ New Appointment [View Event Details](#)

☐ View All Site Events

Step 6 Complete the Appointment Event Details section.



Appointment Event Details

Event: Permanent Separation  
Event Date: 07/28/2023

Separation Reason: Resigned

Unused Sick Leave ☐ Days ☒ Hours  
Time Format:  Hours (or 3,000 Days)

Unused Education Leave ☐ Days ☒ Hours  
Time Format:  Hours (or 3,000 Days)

Select a time format (days or hours) to enter any remaining leave balance for each type listed above that was earned but unused during the member's period of employment with Department Of Fish And Wildlife. Do not include any unused leave balances that were earned during non-membership periods, under non-CalPERS reportable positions, or during periods of overtime.

The unused sick leave and/or unused educational leave field:

- Will only display if your agency contracts for the optional benefit.
- Is only converted into service credit if the separation reason is Retirement.
- Can be entered in days or hours.

Step 7 Select the **Save** button. The member will be mailed an Options at Separation letter advising of their options as an inactive member.

**You have completed this scenario.**

## Scenario 8: Delete an Appointment Event

Maintaining employee appointment details is essential for data integrity. You must remove an inaccurate appointment event from an employee's appointment history.

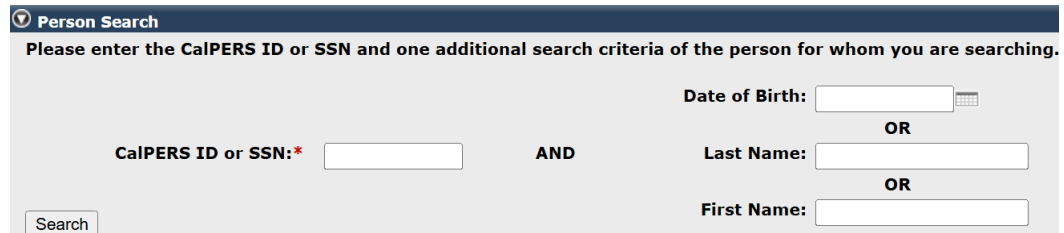
### System Logic

- You are unable to delete a retirement appointment using this scenario. Refer to unit 3, scenario 4 to delete an appointment.
- Deleting an appointment event may impact payroll reporting, so notify payroll department of any changes.

### Step Actions (6 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.



**Person Search**

Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:\*  AND Date of Birth:

OR

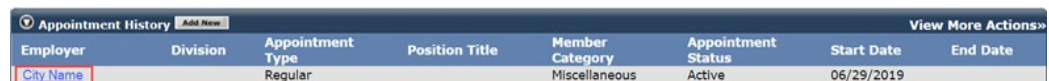
Last Name:

OR

First Name:


Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate active **Employer** link.



| Appointment History |          | Add New          |                | View More Actions» |                    |            |          |
|---------------------|----------|------------------|----------------|--------------------|--------------------|------------|----------|
| Employer            | Division | Appointment Type | Position Title | Member Category    | Appointment Status | Start Date | End Date |
| City Name           |          | Regular          |                | Miscellaneous      | Active             | 06/29/2019 |          |

Step 5 Select the radio button of the event you wish to delete.



**Appointment Event History** Add New

☐ View All Site Events

| Event Date                                  | Event           | Event Details                      |
|---|-----------------|------------------------------------|
| <input checked="" type="radio"/> 12/31/2021 | End Leave       |                                    |
| <input type="radio"/> 05/01/2021            | Begin Leave     | Unpaid Leave                       |
| <input type="radio"/> 12/05/2011            | New Appointment | <a href="#">View Event Details</a> |

☐ View All Site Events

Step 6 Select the **Delete** button.

**You have completed this scenario.**

## Unit 4: Retirement Appointment Reconciliation

The Retirement Appointment Reconciliation (RAR) tool is used to identify appointments with unposted payroll records for your agency. Of those appointments with missing payroll, you may delete the appointment or maintain the following events:

- Permanent Separation
- Begin Leave
- End Leave

### System Logic

- You may select multiple appointments to maintain.
- myCalPERS will update the RAR page on the last day of each month.
- Maintaining appointments within the RAR page automatically updates the list.
- Transactions completed outside the RAR pages, such as updating the appointment within the employee's profile page, will update the list the following business day.
- On Leave appointments with the following will be excluded from the list:
  - Appointments without an End Leave event will be excluded for six months.
  - Appointments with an End Leave event will be excluded for the entire leave.
- Active employees with no posted payroll within the last six months will automatically be permanently separated through a monthly process.

Refer to the [myCalPERS Retirement Appointment Reconciliation \(PDF\)](#) student guide for additional information.

### Contents

|   |    |
|---|----|
| Scenario 1: Add an Appointment Event.....         | 28 |
| Scenario 2: Delete a Retirement Appointment ..... | 29 |

## Scenario 1: Add an Appointment Event

You may add Permanent Separation, Begin Leave, or End Leave events.

### Step Actions (7 Steps)

Step 1 Select the **Reporting** global navigation tab.

Step 2 Select the **Retirement Appointment Reconciliation** local navigation link.



Step 3 In the Participants With Unposted Payroll section, select the check box for each employee who has an appointment that needs to be maintained.

A screenshot of a web application interface titled 'Participants With Unposted Payroll'. It features a table with columns: Participant CalPERS ID, Name, Appt ID, Appt Status, Member Account Status, Retired Annuitant, Last Reported Earned Period, Payroll Past Due, and Unposted Payroll Periods. There are three rows of data. The first row is for Jones, Jason L. (ID: 0123456789, Appt ID: 01234). The second row is for Pham, Chi Thao A. (ID: 1234567890, Appt ID: 2345). The third row is for Smith, Boyd B. (ID: 2345678901, Appt ID: 9876). Each row has a checkbox in the first column, and all three checkboxes are checked. To the right of the table, there are links for 'Maintain Enrollment', 'Select All', and 'Number of Appointments Listed: 25'. There are also pagination controls showing 'Showing 1 to 25 of 25 entries' and 'First Previous 1 Next Last'.

Step 4 Select the **Maintain Enrollment** button.

Step 5 Complete the Appointment Event Details section.

A screenshot of a web application form titled 'Appointment Event Details (1 of 3)'. The form displays information for a participant with CalPERS ID 1234567890, Name Pham, Chi Thao A., Member Category Miscellaneous, Enrolled in Health: Yes, and Health Payment Method: Standard. It also shows appointment details: Appt ID: 2345, Start Date: 9/03/1962, Appt Status: Active, and Last Reported Earned Period: 11/14/2020-11/27/2020. There are links for 'View Appointment History' and 'View Transaction History'. Below this information, there are two input fields: 'Event: \*' with a dropdown menu and 'Event Date: \*' with a date picker. At the bottom, there are two buttons: 'Delete Appointment' and 'Skip Appointment'.

- The Begin Leave event is the day after the last day at your agency, even if it is a weekend or holiday.
- The End Leave event is entered as the date the employee returns to work.
- The permanent separation date must be entered as at least one day after the last day at your agency, even if the date falls on a weekend or a holiday.

Step 6 Select the **Save & Go to Next** button if needed.

**Note:** If the Event type is Begin Leave, you may select the **Save & Add Event** button to add an End Leave event for this employee.

Step 7 Did you select more than one check box?

**Yes:** Return to step 5.

**No:** You have completed this scenario.

## Scenario 2: Delete a Retirement Appointment

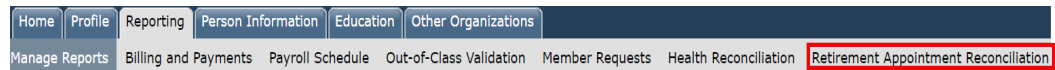
### System Logic

You are unable to delete an appointment that has payroll and/or health benefits attached. Contact CalPERS for assistance.

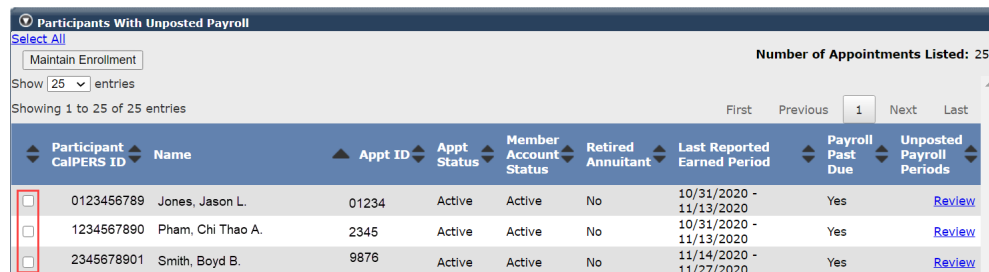
### Step Actions (7 Steps)

Step 1 Select the **Reporting** global navigation tab.

Step 2 Select the **Retirement Appointment Reconciliation** local navigation link.



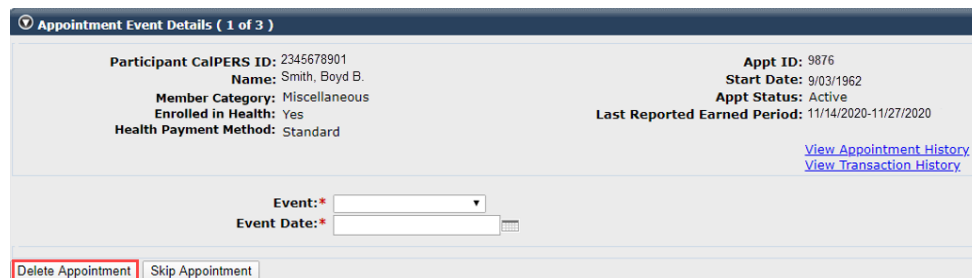
Step 3 In the Participants With Unposted Payroll section, select the check box for each employee who that has an appointment that needs to be deleted.

The screenshot shows a table titled 'Participants With Unposted Payroll'. It has columns for Participant CalPERS ID, Name, Appt ID, Appt Status, Member Account Status, Retired Annuitant, Last Reported Earned Period, Payroll Past Due, and Unposted Payroll Periods. Three rows are visible, each with a checkbox in the first column. The first row is for Jones, Jason L. (ID: 01234), the second for Pham, Chi Thao A. (ID: 2345), and the third for Smith, Boyd B. (ID: 9876). All three checkboxes are selected (checked).

| Participant CalPERS ID              | Name                         | Appt ID | Appt Status | Member Account Status | Retired Annuitant | Last Reported Earned Period | Payroll Past Due | Unposted Payroll Periods |
|-------------------------------------|------------------------------|---------|-------------|-----------------------|-------------------|-----------------------------|------------------|--------------------------|
| <input checked="" type="checkbox"/> | 0123456789 Jones, Jason L.   | 01234   | Active      | Active                | No                | 10/31/2020 - 11/13/2020     | Yes              | <a href="#">Review</a>   |
| <input checked="" type="checkbox"/> | 1234567890 Pham, Chi Thao A. | 2345    | Active      | Active                | No                | 10/31/2020 - 11/13/2020     | Yes              | <a href="#">Review</a>   |
| <input checked="" type="checkbox"/> | 2345678901 Smith, Boyd B.    | 9876    | Active      | Active                | No                | 11/14/2020 - 11/27/2020     | Yes              | <a href="#">Review</a>   |

Step 4 Select the **Maintain Enrollment** button.

Step 5 Select the **Delete Appointment** button.

The screenshot shows the 'Appointment Event Details (1 of 3)' form. It displays participant information (ID: 2345678901, Name: Smith, Boyd B., Member Category: Miscellaneous, Enrolled in Health: Yes, Health Payment Method: Standard) and appointment information (ID: 9876, Start Date: 9/03/1962, Appt Status: Active, Last Reported Earned Period: 11/14/2020-11/27/2020). There are links for 'View Appointment History' and 'View Transaction History'. At the bottom, there are fields for 'Event' and 'Event Date', and two buttons: 'Delete Appointment' (highlighted with a red box) and 'Skip Appointment'.

Step 6 Select the **Save & Go to Next** button if needed.

Step 7 Did you select more than one check box?

**Yes:** Return to step 5.

**No:** You have completed this scenario.

## CalPERS Resources

Obtain more information by visiting the [CalPERS website](http://www.calpers.ca.gov) at [www.calpers.ca.gov](http://www.calpers.ca.gov).

- [myCalPERS Student Guides & Resources](#)  
**Pathway:** CalPERS website > Employers > Employer Education > myCalPERS Student Guides & Resources (*under Resources heading*)
- [Business Rules & myCalPERS Classes](#)  
**Pathway:** CalPERS website > Employers > Employer Education > Business Rules & myCalPERS Classes
- [Self-Paced Online Classes](#) (log in to myCalPERS, select the **Education** global navigation tab, then the **Classes** local navigation link)
  - Business Rules
    - Qualifications for California State Universities (CSU)
    - Qualifications for Public Agencies, State Agencies & Schools
    - Requirements for Public Agencies & Schools
    - Working After Retirement
  - myCalPERS
    - Add Appointment Events
    - Add a New Appointment
    - Add a Position Title
    - Edit Reciprocal Information
    - Enrolling a Retired Annuitant
    - Navigate Your Retirement Contract Benefits
    - Out-of-Class Reporting
    - Reconcile by Appointments
- [myCalPERS Technical Requirements](#)  
**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements
- [Circular Letters](#)  
**Pathway:** CalPERS website > Employers > Circular Letters
- [Public Agency & Schools Reference Guide \(PDF\)](#)  
**Pathway:** CalPERS website > Employers > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)
- [Public Employees' Retirement Law \(PERL\)](#)  
**Pathway:** CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)

- [myCalPERS Employer Reports \(Cognos\) Catalog](#)

**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog

Some common reports that are run for retirement enrollment:

- Automatic Permanent Separation-Potential Appointments Report (PDF)
- Benefit Recipients by Employer Report (PDF)
- Business Partner On Leave Report (PDF)
- CalPERS ID and Appointment ID Report (PDF)
- Confirmation of No Payroll Contributions Reportable Report (PDF)
- Overtime Appointment Identifier Report (PDF)
- Participant Appointment Details Report (PDF)
- Participant Enrollment History Report (PDF)
- Participant Pension Enrollment Data Report (PDF)
- Participant Undeliverable Address Report (PDF)
- Retired Annuitant Hours Worked Report (PDF)
- Retired Annuitant Late Fee Status Report (PDF)
- Retirement Appointment Reconciliation Report (PDF)
- Separated Retirement Reconciliation Appointments Report (PDF)

# CalPERS Contacts

## Email

- To contact the [Employer Education Team](#) for questions and requests, email **calpers\_employer\_communications@calpers.ca.gov**.
- To contact the [Employer Account Management Division](#) for questions related to Retirement Appointment Reconciliation, email **employertechnicalsupport@calpers.ca.gov**.
- To contact the [Employer Account Management Division](#) for questions about membership, email **membership\_reporting@calpers.ca.gov**.
- To contact the [Membership and Post Retirement Employment Determinations Team](#) for post-employment questions, email **working\_after\_retirement@calpers.ca.gov**.
- To contact the [Employer Response Team](#) for assistance with your most critical, complex, or time-sensitive issues, email **ert@calpers.ca.gov**.

## Phone or Fax

You can reach CalPERS at **888 CalPERS** (or **888-225-7377**), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

- TTY: (877) 249-7442 (This number does not accept voice calls)
- CalPERS centralized fax number: (800) 959-6545
- Employer Response Team phone number: (800) 253-4594

## Submit Inquiry

You can send secure messages through myCalPERS. Expand the **Common Tasks** left-side navigation, then select the **Submit Inquiry** link to submit a question or request.